Successfully Using PG&E's Energy Data Request Portal

There are a number of capabilities available on the Energy Data Request Portal for organizations interested in analyzing energy use in compliance with CPUC requirements. This User Guide describes how to:

- Access and download publicly available data sets of electric and gas usage.
- Use other publicly available features of the Portal.
- Submit a data request and have it approved.

Download Public Energy Usage Data Sets

PG&E provides quarterly data sets of gas and electric usage by Zip Code by month in our Service Territory. The series starts with October, 2013, and the first data sets – PGE_2014_Q3_xxxx – c over the last three month of 2013 and the first nine months of 2014. Subsequent data sets cover a quarter's worth of electric or gas usage, split among residential, commercial, industrial, and agricultural use for electric, and residential and commercial only for gas. To preserve customer confidentiality, any Zip Code with less than a minimum number of customers in each category is combined with a neighboring Zip Code in the data sets.

To access the download page, go to www.pge.com/energydatarequest and click the link View a list of public data sets ». You can also go directly to https://pge-energydatarequest.com/public_datasets. Click on the data set you want to download. You'll be asked to provide your name and email address, and agree that you will use the data in accordance with CPUC Decision 14-05-016. Then you can download through the normal Windows Explorer interface.

The downloaded file will be zipped. When unzipped, the file will be in .csv format, sorted by Month, Zip Code, and Customer Type.

Other Publicly Available Features

Three of the other features that are available from the public side of the Portal are

1. A list of other data requests received. This can be linked to from the public landing page, or viewed at https://pge-energydatarequest.com/data-requests. The list shows the submitting organization, submitted date, status, and a brief description of the request. Only requests that are in process or finished are displayed – new data requests that have not yet been reviewed are only visible to the requestor, when logged in.
2. Information about the Energy Data Advisory Committee established by the CPUC to guide implementation of Decision 14-05-016, at https://pge-energydatarequest.com/edac-

committee1. Information provided includes members with contact information, minutes of meetings, agenda for the next meeting, and any relevant notifications.

3. A set of Frequently Asked Questions (FAQs) that cover the topics most often raised by visitors to the portal and others interested in accessing energy usage data. The FAQs can be accessed from a link on the right side of each public page.

How to Submit a Request and Have It Approved

Requesting energy usage data from PG&E under CPUC Decision 14-05-016 requires adhering to the rules established in that decision and subsequent guidelines developed by California utilities. This User Guide is intended to help you complete your request for data more easily, and in a way that will satisfy the rules and guidelines for approving the request.

Please send any feedback on this Guide to energydatarequest@pge.com.

What's Needed to Submit a Successful Request – New Requestor

1. Create an account on the energy data request website, at www.pge.com/energydatarequest, by clicking on the link to Register to request specific kinds of data ». See additional details in the next section, under "Register".

2. Provide information about yourself and your organization. See details in the next section, under "Step 1: Requestor Information."

3. Indicate what kind of organization you represent: Local Government; Academic; State or Federal Government; Community Services & Development Agency. These are the only organization types allowed to submit data requests under the CPUC Decision. Provide additional information as requested based on your organization type. See details in the next section under "Step 2: Requestor Validation."

4. Provide information about the data you are requesting, and the reason for your request. This step can require more time to complete, so we recommend you collect the necessary information in advance. See details in the next section under "Step 3: Description of Request." Be sure to read the guidelines in that section for a compliant request, to speed the processing and the delivery of the requested data to you.

5. Review your request, agree to the Terms & Conditions, and click "Submit."

At any point in 2 through 5 above, before you click "Submit," you can return to a prior step to modify your entries. You can also "Save and Stop" in any step until you click "Submit," then come back later to continue.

Detailed Instructions

Step 1: Requestor Information

This step provides PG&E with the basic information needed about who we will work with on the request, who they represent, and what contacts the requestor may already have had with PG&E or other California utilities regarding this request.

Register & Request Data

Step 1: Requestor Information   Step 2: Requestor Validation   Step 3: Description of Request   Step 4: Review & Submit

Complete this initial registration process for requesting data. You can save at the end of each step and return and log in to finish later. After completing this online form, you will receive an email with further instructions to e-sign documents.

Organization Information   * Required field

Organization Name: *	
Organization Address 1: *	
Address 2:	
City: *	
State: *	California ▼
Zip: *	
Organization Taxpayer ID Number: *	
Organization Representative Name: *	
Organization Rep Title/Role: *	
Organization Rep Phone Number: *	
Organization Rep Email Address: *	
Re-enter Email Address: *	

Contact at PG&E

Do you have a contact at PG&E?	○ No ● Yes
Utility Point of Contact Name:	
Utility Point of Contact Email:	

Additional Utilities

Are you requesting this data from other California investor-owned utilities?: *   ○ No   ◉ Yes

Which other utilities? (check all that apply):
- ☐ Southern California Edison
- ☐ Southern California Gas
- ☐ San Diego Gas & Electric

[Save & Quit]   [Save & Continue]

All fields marked with an * are required for completing this step.

- The "Organization Name" should be specific: Alameda County Department of Public Health rather than Alameda County; UC Berkeley Environmental Sciences Department rather than University of California, Berkeley.

- The "Organization Taxpayer ID Number" is the nine digit Employer Identification Number for your organization, in the format 99-9999999.
- "Organization Rep Email Address" need not be the same email address you used to register.

After filling all fields successfully, either 'Save & Quit' (you can come back later, log in with your username and password, and will pick up at Step 2) or 'Save & Continue' to go to Step 2 immediately.

Step 2 – Requestor Validation

The purpose of this step is to confirm your organization fits within the approved classes from the CPUC Decision, and to gather additional information specific to the type of organization you represent.

Register & Request Data

Step 1: Requestor Information   **Step 2: Requestor Validation**   Step 3: Description of Request   Step 4: Review & Submit

Complete this initial registration process for requesting data. You can save at the end of each step and return and log in to finish later. After completing this online form, you will receive an email with further instructions to e-sign documents.

* Required field

Requestor Validation

Type of Requestor:*   ○ Local Government
○ Academic Researcher
○ State or Federal Agency
○ Community Services & Development (CSD)

[Previous]   [Save & Quit]   [Save & Continue]

If your organization is not one of the four organization types listed, you cannot obtain energy usage data through the Energy Data Request Portal. "Local Government" is defined broadly to include special purpose government agencies, like the Bay Area Rapid Transit District, as well as counties and cities.

Local government requestors will be required to sign the Terms of Service (TOS) document in DocuSign after PG&E has reviewed their request and determined it is complete. The requestor will receive an email from DocuSign when the TOS is ready for signature.

Requestor Validation

Type of Requestor:* ⦿ Local Government
                     ◯ Academic Researcher
                     ◯ State or Federal Agency
                     ◯ Community Services & Development (CSD)

Terms of Service

Local governments requesting aggregated or anonymized energy data must sign a terms of service prior to receiving any data. Only a representative from the local government is qualified to sign this Terms of Service. An authorized representative will be required to sign the Terms of Service electronically after submitting this online form, before this request for data can be completed. View Sample Terms of Service.

Non-Disclosure Certificate

Does the local government plan on   ⦿ No
providing the requested data to a   ◯ Yes
contractor?:*

[Previous] [Save & Quit] [Save & Continue]

If the requestor is planning to share the requested data with a third party, then additional information is needed as shown below. The agent will be required to sign electronically a Non-Disclosure Certificate, and will receive an email from DocuSign to do so at the same time the requestor receives the email requesting a signature on the TOS.

Requestor Validation

Type of Requestor:* ● Local Government
                     ○ Academic Researcher
                     ○ State or Federal Agency
                     ○ Community Services & Development (CSD)

Terms of Service

Local governments requesting aggregated or anonymized energy data must sign a terms of service prior to receiving any data. Only a representative from the local government is qualified to sign this Terms of Service. An authorized representative will be required to sign the Terms of Service electronically after submitting this online form, before this request for data can be completed. View Sample Terms of Service.

Non-Disclosure Certificate

Does the local government plan on providing the requested data to a contractor?:*   ○ No
                                                                                   ● Yes

Contractors or agents working on behalf of a local government must sign a non-disclosure certificate prior to receiving any customer data from the local government. As an agent, contractor, or other third party working on behalf of the local government, You will be required to electronically sign and return a non-disclosure certificate after submitting this online form before this request for data can be completed. View Sample Non-Disclosure Certificate.

Agent Representation

Is there an Agent (e.g., consultant, etc.) with legal authority to represent the organization?:*   ○ No
                                                                                                  ● Yes

Agent Name:* [_____]

Agent Company:* [_____]

Agent Title/Role:* [_____]

Agent Phone Number:* [_____]

Agent Email Address:* [_____]

Re-enter Email Address:* [_____]

[Previous]   [Save & Quit]   [Save & Continue]

After filling all fields successfully, either 'Save & Quit' (you can come back later, log in with your username and password, and will pick up at Step 3) or 'Save & Continue' to go to Step 3 immediately.

Academic researchers must represent an accredited, non-profit college or university. If you are submitting this request on behalf of the lead or sponsoring researcher, the name and title of the sponsoring faculty member must be provided. The sponsoring faculty member or other legally authorized representative of the college or university will be required to sign the data release nondisclosure agreement. If you provided your email address in Step 1, but will not be the signatory, the DocuSign request to signature will still come to you, and will need to be forwarded by you to the signer.

Complete this initial registration process for requesting data. You can save at the end of each step and return and log in to finish later. After completing this online form, you will receive an email with further instructions to e-sign documents.

Requestor Validation

* Required field

Type of Requestor:* ○ Local Government
               ● Academic Researcher
               ○ State or Federal Agency
               ○ Community Services & Development (CSD)

Name of non-profit college or university you represent:* [_____] [?]

Department:* [_____]

Department Phone Number:* [_____]

Are you responsible for carrying out the terms of this data release and nondisclosure agreement?:* ● No   ○ Yes

Sponsor/Responsible Faculty Member Name:* [_____] [?]

Sponsor/Responsible Faculty Member Job Title:* [_____]

Describe how your project/research supports California energy use & conservation:* [_____] [?]

Content limited to 2000 characters, remaining: **2000**

In addition to providing the information above, we ask that you have the appropriate Institutional Review Board certification:

Project Certification

Has the project has been certified by CPHS, CHHSA or an Institutional Review Board and demonstrated to be in compliance with California Civil Code Section 1798.24(t)?

○ No
○ Yes

Non-Disclosure Agreement

Academic research institutions requesting customer energy usage or usage-related data must agree to a Non Disclosure Agreement (NDA) with PG&E executed by a faculty member/sponsor or other legally authorized representative of the requestor which covers this request. The faculty member or other legal representative of the requestor must sign an NDA prior to receiving the requested information. View a copy: Sample Non Disclosure Agreement

IRB Certification

Has your project been certified by an Institutional Review Board to be in compliance with the Common Rule for the Protection of Human Subjects, 45 C.F.R. 690?* Proof of certification must be provided prior to receiving the requested information.

○ No
● Yes, I will upload document now

[Choose File] No file chosen
Only file types .pdf, .png, .txt and .zip are allowed.

[Previous] [Save & Quit] [Save & Continue]

Uploading the certification now will expedite the PG&E review of your request. Please only upload documents in the indicated formats: PDF, PNG, TXT, or ZIP.

After filling all fields successfully, either 'Save & Quit' (you can come back later, log in with your username and password, and will pick up at Step 3) or 'Save & Continue' to go to Step 3 immediately.

State or Federal Government and **Community Services & Redevelopment** requests are straightforward: simply indicate the relevant statutory obligation and why the data are needed to comply with that obligation:

Step 1: Requestor Information Step 2: Requestor Validation Step 3: Description of Request Step 4: Review & Submit

Complete this initial registration process for requesting data. You can save at the end of each step and return and log in to finish later. After completing this online form, you will receive an email with further instructions to e-sign documents.

* Required field

Requestor Validation

Type of Requestor:* ○ Local Government
○ Academic Researcher
● State or Federal Agency
○ Community Services & Development (CSD)

Statutory Obligation

Is the data needed to comply with a statutory obligation?:* ○ No ● Yes

How is the data needed to comply with the statute? Please reference the statute name/number and include references to the statute text:*

Content limited to 510 characters, remaining: 510

[Previous] [Save & Quit] [Save & Continue]

Step 3 – Description of Request

Providing a thorough description of the data being requested, and the purpose of the request, will help ensure a faster decision from PG&E on your request.

Provide the start and end dates for which you want the data. Note that the End Date can be a future date, if you have a recurring request where the data needs to be refreshed periodically. Indicate in the Description of Data if your request is recurring, and if so with what frequency (quarterly, etc). You can submit recurring requests that run up to two years in the future.

The Description of Data must address

- What your purpose is for obtaining the data.
- Why you need the particular data being requested.

- The opportunity, problem, or question the requested data will help you address.
- Other information to help PG&E understand what will be done with the data, to help assess whether the request complies with the CPUC Decision.
- The specific data you are requesting: for example, hourly interval electric usage for solar customers on electric vehicle rates and for non-solar EV rate residential customers in the same Zip Code, with addresses.
- Whether you want the data grouped by Zip Code, City, or County. At present these are the only grouping options.
- If others will be accessing the data, list names, organizations, and roles.

Register & Request Data

Step 1: Requestor Information Step 2: Requestor Validation **Step 3: Description of Request** Step 4: Review & Submit

|

* Required field

Data Sample Time Period

Date of Request:	02-12-2015
Start Date:	01-01-2013
End Date:	12-31-2015
When will you dispose of or return the customer data provided?:	01-01-2017

Description of Data

Summarize your need and purpose for obtaining this information. Describe the question you are trying to answer or problem you are trying to solve*

Content limited to 100000 characters, remaining: 100000

What data are you requesting?:
(e.g usage data, usage-related data etc)
(see example)

Content limited to 1000 characters, remaining: 1000

What boundaries are being requested?:*
- ◉ Zip Code
- ○ City
- ○ County

Do you plan to share the data with any third-parties?:*
- ○ No
- ◉ Yes

Indicate with whom data will be shared:*

Content limited to 510 characters, remaining: 510

Because maintaining data confidentiality is critical, there are several questions regarding how you will handle the data once received. The data set you will download from the Energy Data Request Portal has been encrypted at PG&E facilities until your download; you may want to consider encrypting it again except when analyzing it. If the data will be sent to someone else, describe how the confidentiality of the data will be maintained during the transmission.

All five questions below need to be addressed.

Data Handling Procedures

Describe your company's internal procedure and controls for handling and protecting confidential and customer information from unauthorized use, disclosure or release.

How do you plan to securely transmit data received from PG&E?:

Content limited to 1000 characters, remaining: 1000

How will it be securely stored?:

Content limited to 1000 characters, remaining: 1000

How will it be securely handled?:

Content limited to 1000 characters, remaining: 1000

How will access be controlled?:

Content limited to 1000 characters, remaining: 1000

How will it be securely disposed of?:

Content limited to 1000 characters, remaining: 1000

[Previous step] [Next step]

Step 4 – Review and Submit

In this step you will see everything you've entered. Review carefully, and use the controls at the bottom of the page if you need to return to a prior page to change any entries.

Once the registration and request are complete to your satisfaction:

- Review the "Terms & Conditions" at the link near the bottom of the page
- Check the "I accept the Terms & Conditions" box
- Fill in the characters you see above the box near the bottom
- Click the "Submit" button

You'll see a thank you page, and will shortly receive an email confirming your submittal with a PDF of the submitted request attached.

Next Steps

After you submit the data request, PG&E has seven business days to take action. PG&E will respond with an email saying either

- Please sign the Terms of Service or Nondisclosure Agreement (if appropriate), with a link to the PDF in DocuSign for electronic signature; or
- A rejection of the request because it clearly falls outside the bounds of the CPUC Decision; or
- A request for more information.

You will then have seven business days to sign the request in DocuSign (if appropriate); or to provide the additional information requested.

Once you have electronically signed the request (and any contractors that will be receiving the data from you have signed their Nondisclosure Certificates), PG&E will review the request in detail to verify it conforms to the CPUC Decision and that PG&E is able to provide the data requested. Within three weeks PG&E will notify you that your request is approved and the data are being collected; or provide you with reasons why the request cannot be fulfilled.

The time required to actually collect and format the data will vary depending on the complexity of the request, but in no case will you receive notification that the data are ready for download in less than four weeks, due to the CPUC notification lead time requirement in the decision.

You will receive an email once the data are ready for download. Log in with your Username and password at www.pge.com/energydatarequest, and the landing page will include an entry similar to the below:

Date of Request	Request Number	Status	Action
02/05/2015	rn2070809403	Completed	Download Data

Clicking on "Download Data" will open a Windows Explorer-like interface for you to download the data set to your local environment.

Very Important: you are only allowed to download the data set once. After downloading, the "Action" link will disappear. As some data sets can be very large, you should download when there will be

adequate time to complete the download process, considering your internet connection speed. If you need a subsequent download of the same data set, send a request to energydatarequest@pge.com, and include the Request Number.